iSG Provider Lens™

Retail & CPG Services

Managed Services

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:

Infosys

QUADRANT REPORT | JUNE 2023 | EUROPE

Table of Contents 🏠

Executive Summary

Report Author: Philip Carnelley

Convergence and transformation in the retail and CPG sector in the post-COVID era

Retail and CPG are becoming increasingly alike

Retail and consumer packaged goods (CPG) companies are becoming alike in their operations and aspirations due to changing consumer behavior, technological advancements and market dynamics, a defining characteristic of today's consumer markets.

Notably, CPG companies are adopting a direct-to-consumer (D2C) sales approach to their customers to widen their reach through own-brand stores and online channels. Some major CPG brands aim to achieve more than half of their sales through D2C channels. Even those that do not pursue D2C sales are developing customer relationships through loyalty programs, highly personalized marketing and offers redeemable through stores.

At the same time, many retailers are developing their private-label brands, promoting and selling them directly to consumers in stores and online, blurring the lines between traditional retail and CPG companies. Omnichannel commerce utilizing mobile, social, internet and in-person sales and marketing is thus vital to retailers and CPG companies. New IT approaches, such as headless commerce based on microservices architecture, are paving the way forward.

Pandemic recovery drives further transformation as customer behavior adapts to the new normal

The COVID-19 pandemic forced many retail and CPG companies to rapidly adopt digital technologies to meet changing consumer demands. E-commerce platforms became a vital channel for sales, prompting increased investments in online storefronts, mobile apps and omnichannel capabilities. Traditional brick-and-mortar stores also implemented technologies such as contactless payment systems, self-checkout options and in-store pickup solutions to enhance the overall shopping experience.

Customer behavior **continues to evolve** as consumers **rediscover** in-person shopping.

That work continues as the changes made are consolidated and refined as companies evaluate what has worked and what needs to be further changed or developed. Meanwhile, customer behavior continues to evolve as consumers rediscover in-person shopping or discover new preferences, such as quick commerce that offers instant fulfillment from dark stores or micro-fulfillment centers. Therefore, firms need to implement consumer-satisfying and functional models such as buy in-store and return online (and vice-versa). The layout and promotions of food items and other goods in stores have never been more important. The pandemic highlighted the importance of having a robust and efficient supply chain, a strength that has persisted even in the face of behavioral shifts.

Consequently, retail and CPG companies are relying on IT services to digitize and optimize their new customer-facing and supply chain processes. Technologies such as IoT sensors, blockchain and cloud-based supply chain management systems are being used to track inventory in real time, improve visibility, automate processes and ensure product traceability.

Customer experience key focus for digital innovation

Retail and CPG companies use IT services to enhance customer experience. Personalization has become a key aspect, with companies leveraging customer data to offer tailored recommendations, promotions and loyalty programs. AI and machine learning models are increasingly important in improving the performance of the abovementioned approaches, driving better customer support through automated support services and understanding customers to offer personalized responses. Meanwhile, VR and augmented reality (AR) technologies are being used to provide immersive shopping experiences, allowing customers to visualize products and try them virtually before making a purchase.

Automation and robotics are key innovation areas where service providers can provide valuable expertise and solutions. Retail and CPG companies are increasingly leveraging automation and robotics to streamline operations and reduce costs. Automated warehouse systems, RPA and autonomous delivery vehicles are increasingly used to improve efficiency in order fulfillment, inventory management and last-mile logistics.

AI and analytics based on cloud drive better decisions

Retail and CPG companies are increasingly leveraging customer and operations data via analytics and business intelligence tools to gain insights into customer behavior, optimize inventory management and improve operational efficiency. They are utilizing advanced analytics techniques such as machine learning and AI to analyze large volumes of data and make data-driven decisions in areas such as demand forecasting, store layout and supply chain optimization.

During the pandemic, many organizations realized that their analytics and decision models were inflexible and based on out-of-date assumptions. Therefore, there is a large movement currently underway to retool and refresh organizations' analytics capabilities using the latest AI-supported technologies and leverage new cloud-based data architecture to give their models more power, speed and flexibility.

Cloud-first is the new normal

Cloud computing has become the default platform strategy for retail and CPG companies, offering them scalability, agility and potential cost savings. Most organizations have a mix of public, private and hybrid cloud models, and this is set to continue in the foreseeable future.

Organizations are migrating much of their IT infrastructure and business applications to the cloud, enabling them to handle increased online traffic, store and process large amounts of data and leverage cloud-based services for functions such as inventory management, CRM and analytics. Service providers play a key role in devising strategy, highlighting best practices, managing transformations and operating the resultant infrastructures.

Executive Summary

ESG has become a top priority for retail and consumer executives

ISG research has shown that ESG (environmental, social and governance) issues and initiatives are now a top priority for retail and consumer goods company executives, especially in Europe. Companies are looking to reduce their carbon footprint to demonstrate ethical goods supply and creation and reduce waste. Reasons that this trend is so important to firms include:

- **Consumer demand:** Consumers are increasingly demanding that the products they buy are produced in an environmentally and socially responsible way. This is leading to growing demand for sustainable products. Companies that are not seen as being sustainable or ethical in their operations, products and services are at risk of losing market share.

- **Regulatory pressure:** Governments around the world are increasingly regulating businesses to address environmental and social issues. This is leading to a growing compliance burden for businesses, and companies that are not prepared for this are at risk of being fined or even shut down.

- **Investor pressure:** Investors are increasingly considering ESG factors while making investment decisions due to a perception that these can drive business success and an ethically-driven desire to invest in companies that are committed to sustainability.

ESG initiatives rely heavily on IT systems for reporting, supply chain monitoring and other functions. IT service providers are in a prime position to provide advice and solutions. It is notable that many IT service providers in this study have their own ESG policies, a move to reduce their carbon footprint toward net zero.

Security and privacy are retail and consumer businesses' fundamental needs

The increasing reliance of sales and marketing channels on digital technologies and the ever-growing use and distribution of data (especially consumer data) and AI models to guide business decisions and drive processes have increased the significance of cybersecurity and data privacy. In Europe, an organization's privacy and data sovereignty policies are affecting many customer interactions, cloud deployment and architectural decisions.

The cyber-threat landscape continues to widen with growth in sophisticated criminal activities. Retail and CPG companies are engaged in a race to ensure their security measures and technologies can continue to protect their data against cyberattacks and fraud and ensure compliance with privacy regulations such as the General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA). They heavily rely on service providers to provide advice, support and implementation of the relevant technologies and strategies.

> ESG initiatives are now a top priority for retail and consumer goods company executives to maximize customer appeal and enhance the brand to consumers and investors.

Provider Positioning

	Business Transformation Services	Digital Innovation Services	Platform Modernization Services	Managed Services
Accenture	Leader	Leader	Leader	Leader
Capgemini	Leader	Leader	Leader	Leader
Cigniti	Not In	Contender	Not In	Contender
Coforge	Contender	Contender	Not In	Not In
Cognizant	Leader	Leader	Leader	Leader
DXC Technology	Market Challenger	Market Challenger	Market Challenger	Market Challenger
Eviden (Atos)	Market Challenger	Not In	Not In	Market Challenger
Fujitsu	Market Challenger	Not In	Contender	Contender
Genpact	Rising Star ★	Market Challenger	Contender	Contender

Provider Positioning

	Business Transformation Services	Digital Innovation Services	Platform Modernization Services	Managed Services
HCLTech	Leader	Leader	Leader	Leader
Hexaware	Product Challenger	Not In	Not In	Product Challenger
Hitachi Vantara	Market Challenger	Rising Star ★	Market Challenger	Market Challenger
IBM	Leader	Leader	Not In	Not In
Infosys	Leader	Leader	Leader	Leader
Kyndryl	Market Challenger	Contender	Market Challenger	Leader
LTIMindtree	Product Challenger	Product Challenger	Rising Star ★	Leader
Mastek	Not In	Not In	Not In	Contender
Movate	Product Challenger	Product Challenger	Not In	Contender

Provider Positioning

	Business Transformation Services	Digital Innovation Services	Platform Modernization Services	Managed Services
Persistent Systems	Contender	Not In	Contender	Contender
Softtek	Contender	Contender	Product Challenger	Contender
Sutherland	Product Challenger	Product Challenger	Not In	Product Challenger
TCS	Leader	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Product Challenger	Contender	Rising Star ★
Tietoevry	Contender	Contender	Product Challenger	Contender
UST	Product Challenger	Product Challenger	Product Challenger	Contender
Wipro	Leader	Leader	Leader	Leader
Zensar Technologies	Contender	Contender	Contender	Contender

This report assesses retail and CPG services that **enable** clients to **improve**, **transform**, **innovate** and **manage** regardless of market changes.

Simplified Illustration Source: ISG 2023

- Business Transformation Services
- Digital Innovation Services
- Platform Modernization Services
- Managed Services
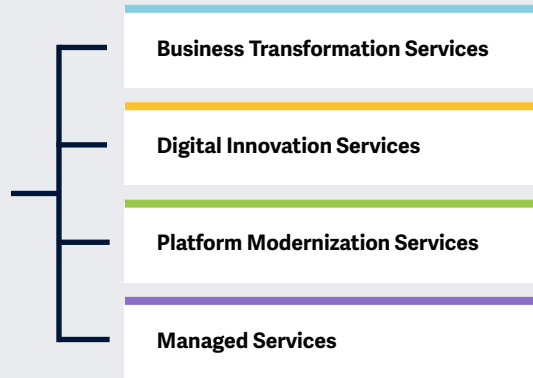
Definition

The COVID-19 pandemic massively broadened and accelerated the need for the digital transformation of consumer-facing businesses, including that of traditional and online retailers and CPG firms seeking to extend and expand direct-to-consumer (D2C) capabilities and revenues.

The sudden onslaught of billions of consumers shopping extensively through digital channels, combined with equally sudden disruptions in supply chains and resource management, highlighted retail and CPG firms' need to adapt business strategies and models and focus on organizational and operating efficiencies, enhanced consumer interaction, improved core systems for payments and fulfillment and more.

This study assesses business and IT service providers that enable retail and CPG firms to reengineer, advance and sustain a broad range and scale of digital business improvements to facilitate survival and competitiveness in today's digital consumer reality.

The service types and providers examined in this study are detailed under the following quadrants:

- **Business Transformation Services** for clients seeking to transform their business organizations, operations and management to be considered as digital-first enterprises.
- **Digital Innovation Services** for clients seeking new tools and methods that enable advanced business capabilities, including new ways to create business value.
- **Platform Modernization Services** for clients seeking to modernize key components or all their core business management software landscapes.
- **Managed Services** for clients seeking to outsource some or all their IT infrastructure, operations, solutions development, user support and associated development and management.

Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following four quadrants for services/solutions: Business Transformation Services; Digital Innovation Services; Platform Modernization Services; and Managed Services.

This ISG Provider Lens™ study offers the following to IT decision makers:

- Transparency on the strengths and weaknesses of relevant providers/software vendors
- A differentiated positioning of providers by segments (quadrants)
- Focus on regional market.

Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between$20 million and $999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptionsare possible).

Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

Managed Services

Who Should Read This Section

This report is relevant to all enterprises in Europe for evaluating retail and CPG managed service providers.

In this quadrant report, ISG highlights the current market positioning of providers offering managed services to retail and CPG clients in Europe and how they address the key challenges faced in the region.

European enterprises are using new cloud capabilities to upgrade their IT infrastructure and applications' scalability and adaptability with reduced operational costs. They are seeking business process and IT outsourcing service providers to help them use state-of-the-art development and management services such as DevOps, AIOps and FinOps for maximum efficiency.

Many firms seek business process services to support their operations, including customer service and support, insight and analytics, finance and industry-specific processes such as store operations, buying and planning.

Modernizing back-office processes can free up resources to work on more differentiating, industry-specific work.

Due to increasing cloud migration, the rising scope of cyber threats and the developing regulatory landscape around privacy and data use, retailers need state-of-the-art security and privacy management service offerings. They are keen to seek outside support and assistance.

In the abovementioned areas, many retailers and CPG firms seek customized service agreements from their providers, with new approaches, such as experience level agreements, becoming more common.

Operations, marketing and sales professionals should read this report to analyze providers' capabilities in managing CX, business processes and data to drive down costs/improve operations.
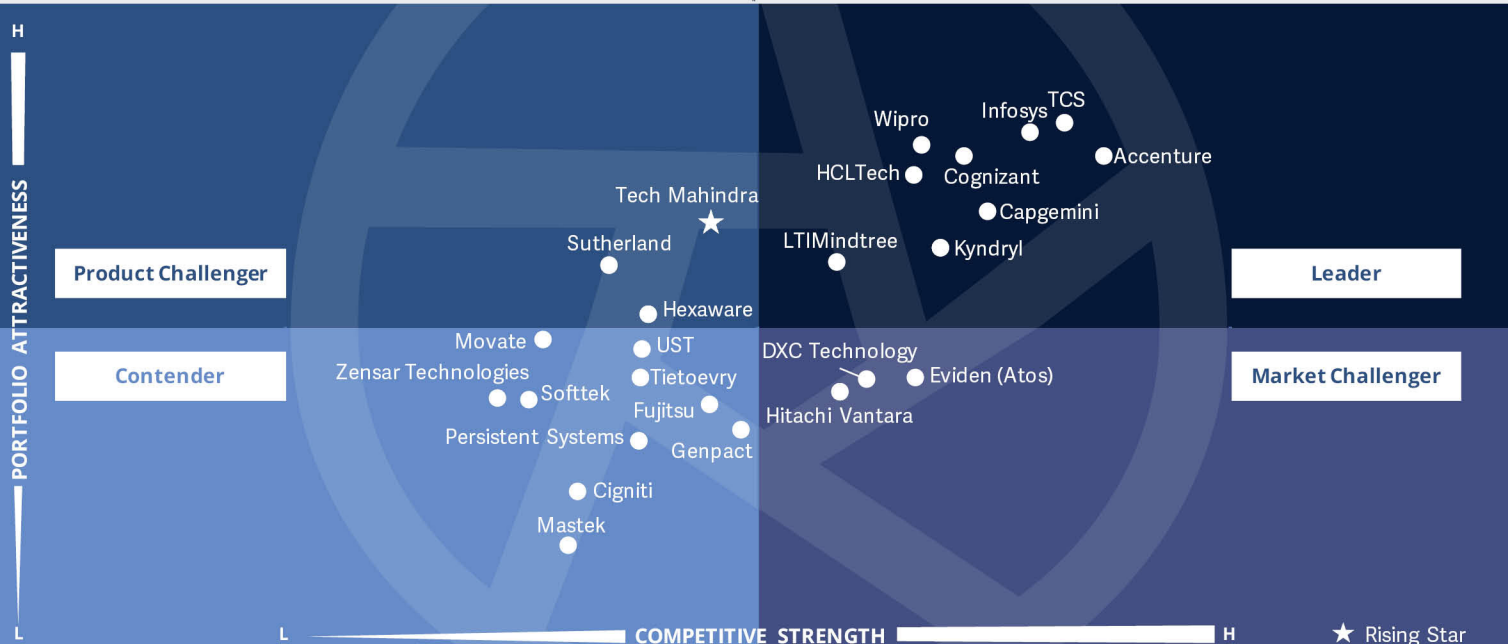
Technology professionals should read this report to understand providers' strengths and weaknesses and the scale and scope of their modernization, IT management and cybersecurity services.

Procurement professionals should read this report to understand better the current landscape of managed service providers in Europe.

ISG Provider Lens™

**Retail & CPG Services
Managed Services**

Source: ISG RESEARCH

Europe 2023

PORTFOLIO ATTRACTIVENESS

Product Challenger

Contender

Leader

Market Challenger

Wipro

Infosys   TCS

HCLTech   Cognizant   Accenture

Capgemini

LTIMindtree   Kyndryl

Tech Mahindra ★

Sutherland

Hexaware

Movate   UST

Zensar Technologies   Tietoevry

Softtek   Fujitsu

Persistent Systems   Genpact

Cigniti

Mastek

DXC Technology

Eviden (Atos)

Hitachi Vantara

COMPETITIVE STRENGTH

★ Rising Star

Retail & CPG firms
wish to increase the
effectiveness of business
and IT operations and
efficiency. This quadrant
assesses how service
providers support those
goals through managed
services for business,
IT, privacy and security
operations.

Philip Carnelley

Managed Services

Definition

This quadrant assesses providers of managed IT services, optimized for retail and CPG clients. Such services typically include infrastructure, networking, applications development and management, and IT security delivered and managed as services.

Clients seeking service providers in this space wish to outsource some or all their IT infrastructure, operations, solutions development, user support, and associated development and management. Leading providers are agile and effectively manage evolving software, networking, infrastructure and support requirements.

Applications of multiple forms of AI improve the agility of managed services providers. The most effective providers leverage AI for large-scale, adaptive automation, which, in turn, enables the use of predictive analytics, system diagnoses and assisted decision-making to increase the efficiency of business operations. Clients increasingly seek providers that ensure compliance with data privacy regulations (for example, the GDPR).

Managed service providers should develop and provide services that address clients' strategic business needs, using disruptive, emerging and market-optimized technologies. In short, managed services providers are a critical resource in enabling retail and CPG clients' grow and succeed as digital-first and innovative enterprises.

Eligibility Criteria

In addition to having a demonstrated presence and an active client base in the Retail & CPG space, providers assessed in this quadrant must demonstrate expertise in some or all of the following capabilities:

1. **Application management** of core finance/ERP/HCM/CRM, sourcing/procurement/purchasing and SCM, POS and payment software and mobile apps

2. **Agile development**, QA and testing, including DevOps and AIOps

3. **Privacy/GDPR compliance** management

4. **IT security management**, including security-as-a-service

5. **Network/infrastructure management**, including core infrastructure management and VPN/SDN management

Observations

Retail and CPG firms have general and industry-specific managed service needs to support their business and IT operations and technology infrastructure.

Besides general support needs such as application, infrastructure and network management, other specialist IT-managed service requirements include point of sale (POS) systems support for sales transactions and inventory management, e-commerce and web application support and retail and CPG-specific vendor management.

Retail and consumer businesses are inherent parts of ecosystems. For example, close interaction with suppliers and last-mile delivery firms for supply chain efficiency. So, the business's IT must be architected and managed to work effectively in that ecosystem context.

Because customer interactions are central to businesses, IT security, privacy and compliance needs, data management capabilities, backup and recovery are important to retail and CPG firms. Many firms require customer service support and call center operation services.

Consequently, the requirements of managed service suppliers by their retail and CPG clients are as demanding as in any industry. Leading suppliers have successfully embraced the latest approaches, such as AIOps and FinOps in cloud service management and Agile for application development. In network management, many retailers seek to take advantage of 5G possibilities. In business process as a service (BPaaS), suppliers must demonstrate industry process capabilities and the ability to improve both effectiveness and efficiency through process modeling, management and improvement.

From the 27 companies assessed for this study, 25 have qualified for this quadrant with 9 being Leaders and one Rising Star.

accenture

Accenture provides a range of managed services for applications, infrastructure and cloud solutions. Accenture manages client infrastructure by leveraging advanced technologies such as automation, AI and ML.

Capgemini

Capgemini has a wide portfolio of managed services offerings, from roadmap development to IT operating model development. It also has a range of tools and accelerators to enhance its managed service offerings.

cognizant

Cognizant's managed service offerings include Cognizant Automation Center, an AIOps platform that facilitates the transition to the no-touch ZeroOps model, and IntelliPeak to help retailers cope with peak holiday season demand.

HCLTech

HCLTech's managed services include digital experience monitoring, IT service management, AIOps and application lifecycle management. Strength in infrastructure and network management solutions can confer a competitive advantage in the market.

Infosys

Infosys has a comprehensive service offering that leverages automation and AI for managed services. For instance, it uses its Live Enterprise Application Platform (LEAP) platform for managed real-time supply-chain interactions.

kyndryl

Kyndryl's extensive experience and expertise in providing IT infrastructure services, cloud and application services at large scale to enterprise clients over the years make it a leader in managed services.

Managed Services

LTIMindtree's recent merger has greatly improved its capability in managed services. It offers frameworks and tools to enable integrated full-stack digital operations.

TCS offers end-to-end IT managed services across enterprise applications, IT systems management, automation and digital engineering. Its Machine First Delivery Model (MFDM) targets improving operational efficiency through automation and AI.

Wipro offers end-to-end managed services with tools, frameworks and an innovation ecosystem leveraging DevSecOps, intelligent automation and AI. It provides integrated services and platforms for managing applications, infrastructure, cloud and security operations.

Tech Mahindra (Rising Star) is becoming increasingly notable for its delivery approach. The company adopts an integrated service management strategy to oversee and optimize clients' entire IT ecosystem.

Infosys

Leader

"Infosys brings a strongly cognitive- and security-oriented approach to managed services for its retail and CPG clients."

Philip Carnelley

Overview

Infosys is headquartered in Bengaluru, India and operates in 54 countries. It has more than 343,200 employees across 247 global offices. In FY23 the company generated $ 18.2 billion in revenue, with Financial Services as its largest segment. It has one of the industry's largest retail and CPG practices, valued at approximately $3 billion, with 55,000 FTEs, of which more than half work on managed services. One-quarter of its revenue comes from Europe. Its notable European customers include AB InBev, Adidas, Ahold Delhaize, Carlsberg, Diageo, Ferrero, Heineken, ICA Gruppen, Specsavers, Swarovski, Travis Perkins, The Body Shop and Unilever.

Strengths

Cloud DevOps services: Infosys aspires to offer business-first, cognitive-first and end-to-end integrated IT operations. Powered by Infosys Cobalt, a set of services, solutions and platforms, Infosys' Cloud DevOps services aim to minimize efforts and costs and maximize scalability and reliability. The company has developed reusable libraries across technology stacks for DevOps and AIOps, and introduced a pay-for-performance managed services model that incorporates metrics for speed, stability and quality across the plan, build and run.

Managed services portfolio: Infosys aims to help its clients expand business operations and deliver innovative shopping experiences. The company has developed industry-specific tools and platforms offering application management services (AMS) and analytics services with real-time data visibility into IT infrastructure. Infosys Live Enterprise Application Management Platform (LEAP) has self-healing capabilities and aims to improve business efficiency and predictability in IT operations.

Automation-enabled services: Infosys has developed a repository of over 26,000 reusable IT project service bots. These enable clients to run operations through autonomous integration with backend systems and handle complex conversational workflows effectively with reduced effort.

Caution

Infosys can further enhance its managed services offerings for retail and consumer companies by helping clients leverage advanced technologies such as metaverse and generative AI in operations, and by designing new security service offerings around omnichannel e-commerce platforms for online fraud prevention and detection.

Appendix

Methodology & Team

The ISG Provider Lens 2023 – Retail & CPG Services research study analyzes the relevant software vendors/service providers in the Europe market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of June 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

The study was divided into the following steps:

1. Definition of Retail & CPG Services market

2. Use of questionnaire-based surveys of service providers/vendor across all trend topics

3. Interactive discussions with service providers/vendors on capabilities & use cases

4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)

5. Use of Star of Excellence CX-Data

6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.

7. Use of the following key evaluation criteria:

    * Strategy & vision

    * Tech Innovation

    * Brand awareness and presence in the market

    * Sales and partner landscape

    * Breadth and depth of portfolio of services offered

    * CX and Recommendation

Author & Editor Biographies

Lead Author

Philip Carnelley
Lead Analyst

Philip Carnelley is a lead analyst for the ISG Provider Lens (IPL) service. He has over 40 years' experience of working in the technology industry as an analyst, consultant and applications developer, in a variety of industries. His focus areas for research have included enterprise applications deployment and use, AI, data and analytics, and digital business transformation. In 2018 he was named one of the top 100 global influencers in digital transformation by Onalytica.

Philip holds a Master's degree in Control Engineering from Sheffield University and a Bachelor's degree in Mathematics from Manchester University. He is a member of the British Computer Society and a Chartered Engineer.

Enterprise Context and Global Overview Analyst

Varsha Sengar
Senior Research Analyst

Varsha Sengar is a senior research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Workday Ecosystem, Manufacturing Industry Services and Retail & CPG Services. She has over 6 years of experience in technology research and in her prior role, she has carried out multiple ad-hoc projects delivering industry level actionable insights and recommendations. At ISG, she is responsible for delivering enterprise' perspective for IPL studies and collaborates with analyst, advisors, and enterprise clients on various research requests which include primary and secondary research.

She supports the lead analysts of multiple regions in the research process and authors the global summary. Her area of expertise lies across various technologies like IoT, Artificial Intelligence, Smart Homes, and Autonomous Driving.

Author & Editor Biographies

IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a partner and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this webpage.

ISG Research™

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ISG

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.

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